

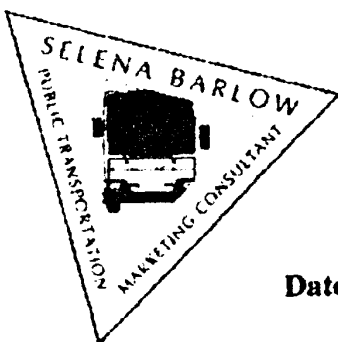
**CITY COUNCIL MEETING
SEPTEMBER 15, 1994**

CITY OF LODI TRANSIT SYSTEM NAMED GRAPELINE

Following report by Assistant City Manager Glenn and Selena Barlow, Public Transportation Marketing Consultant, regarding Transit Marketing Plan and selection of name and logo for the City of Lodi transit system, the City Council, on motion of Mayor Sieglock, Mann second, named the new transit system "Grapeline" by the following vote:

Ayes: Council Members - Mann, Pennino, Snider and Sieglock (Mayor)
Noes: Council Members - Davenport
Absent: Council Members - None

FILE NO. CC-6 AND CC-50(b)



Date: September 12, 1994
To: Lodi City Council Members
From: Selena Barlow
Re: Lodi Transit System Name

At our meeting on September 15th, you will be asked to select a name for the new Lodi transit system which will begin service on November 25, 1994. Based on the input of Lodi's citizens and this consultant's experience marketing transit services, we have selected three names for your consideration. The following memo outlines the factors which should be considered in selecting a name, the advantages of each of the names being considered and our own recommendation.

On September 15th, you will be shown logo treatments of each of the three names to aid you in your final decision.

Factors Considered in Selecting Potential Names

In selecting potential names for Lodi's new transit system, we sought names which had the following characteristics:

- Easy to say, read and remember.
- Versatile enough to be used for fixed route, dial-a-ride and potential future services.
- Related to the character of the Lodi community and public transit as a product.
- Offer opportunity for interesting graphic treatments.

While seeking names that are distinct and memorable, we avoided those that are overly cute or clever as they do not wear well over time.

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Potential Names

After reviewing approximately 100 potential names, those recommended by citizens and our own ideas, we narrowed the field to three potential names that best meet the above criteria.

GrapeLine**COLT: City of Lodi Transit****RIDE Lodi**

Each of these names offers specific advantages.

GrapeLine

- Best relates to the Lodi community. When asked what image they associate with Lodi, almost everyone says grapes.
- Cleverly memorable, but straightforward enough to wear well.
- The word "Line" is often related to transit systems. We can call the routes Line 1, Line 2 etc.
- Versatile enough to be applied to any transit service Lodi may offer.
- Offers excellent potential for creative treatments, both in terms of graphics and copywriting.

COLT: City of Lodi Transit

- This is a wonderful acronym. The name says exactly what the service is and the acronym spells a word which relates to speed and friskiness.
- The acronym is easy to read, say and remember.
- The name is versatile enough to apply to any transit services offered.
- This is a very friendly name, however it does not relate as directly to Lodi's character as does GrapeLine.
- Good potential for graphic treatments.

RIDE Lodi

- This name is different from the other two in that it is a call to action rather than a noun. It commands people to use the system, which might come to be called simply the Ride.
- The name relates directly to transportation and clearly communicates what the product is.

- RIDELodi is versatile enough to cover any transit services.
- This is a somewhat more urban approach, and does not convey the rural charm which characterizes Lodi.

GRAPHTING

Grappleline



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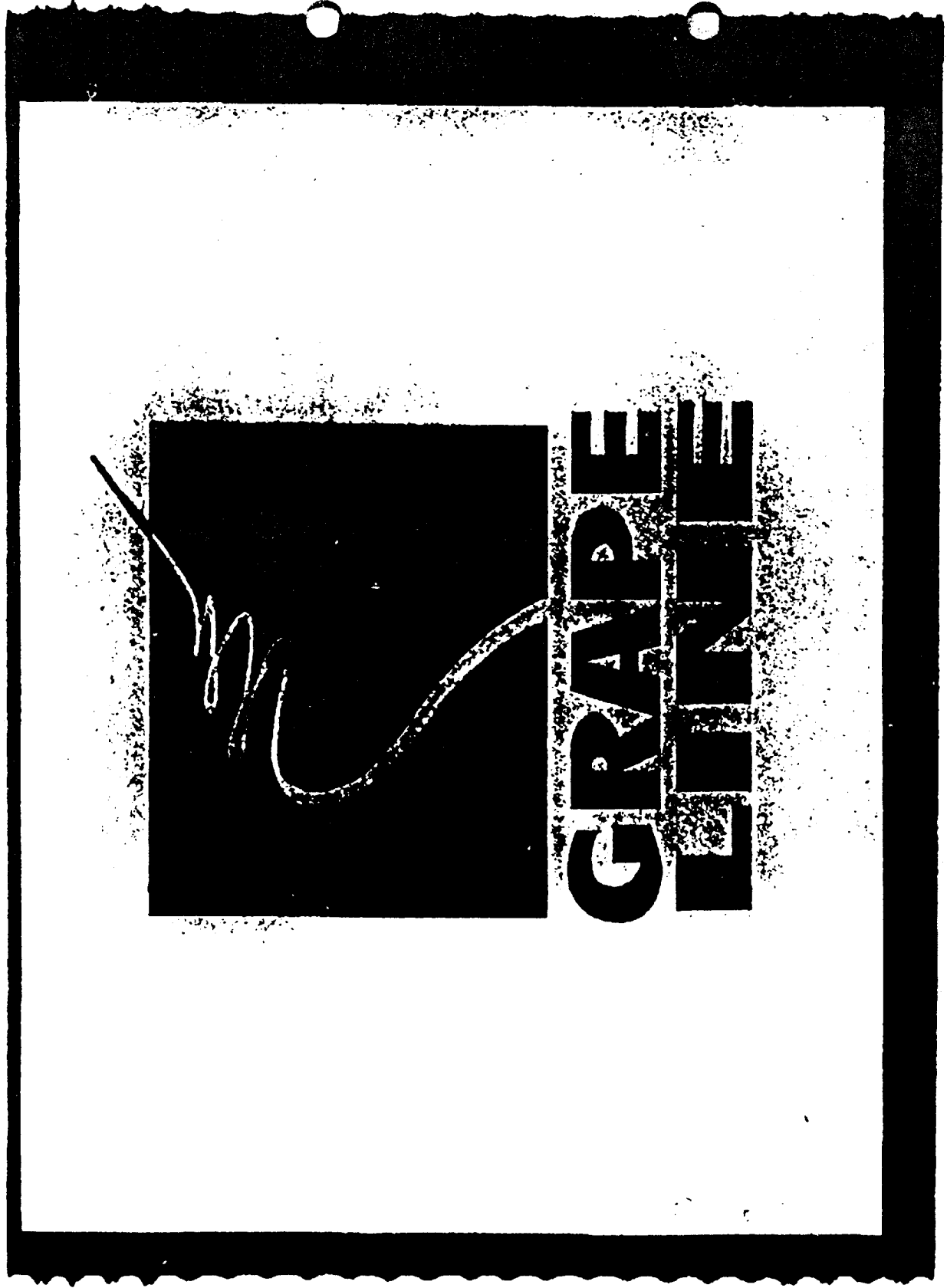
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COLT





Transit Marketing Plan
for
The City of Lodi

TO: GLENN HESTER

ELSON, AZ 85201

602-427-0000

FAX 602-427-0000

Draft
September 15, 1994

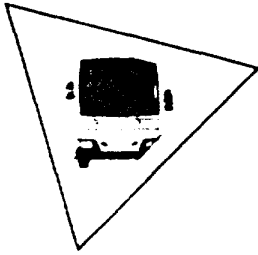
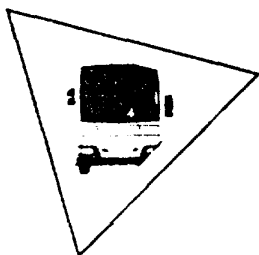


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Introduction

In November of 1994, Lodi will establish a new public transit system which will integrate four new fixed routes with existing dial-a-ride service. Following is a comprehensive Marketing Plan for Lodi's new transit system. This plan will:

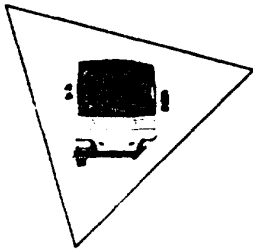
- Briefly review the market information on which marketing recommendations have been based.
- Provide recommendations for establishing an identity for the new transit system.
- Outline strategies for marketing fixed route and dial-a-ride services utilizing the vehicles of:
 - Passenger Information
 - Paid and Non-Paid Advertising
 - Targeted Direct Marketing Programs
 - Community Outreach
 - Public Relations
 - Special Promotions
- Prioritize and schedule these strategies based on the resources expected to be available.

This plan is based on a thorough review of the market and planning information for the Lodi area. Reports and materials reviewed in the development of this marketing plan include:

- City of Lodi Transit Needs Assessment and System Plan
- Lodi Public Transit Short Range Transit Plan
- Lodi, California Community Profile
- Lodi, California 1993 Data Bank

In addition, executive interviews were held with a wide variety of community members including representatives of:

- Lodi Transportation Advisory Committee
- Hutchins Square Senior Center
- Lodi School District
- Lodi District Chamber of Commerce
- Community Blind Center
- Loel Center
- County Service Center
- Lodi Area Employers
- San Joaquin Regional Transit District (SMART)



Summary of Market Information

Overview of Service Area

Population

The city of Lodi, located in northern San Joaquin County, has a population of approximately 55,000. This number has grown steadily over the past ten years and is expected to continue growing at a rate of about 2% per year. The city includes a total of 19,000 occupied households, of which 10,300 are owner occupied and 8,700 rented.

Lodi's population is older than that of San Joaquin County overall. Sixteen percent of the city's residents are 65 years old or older, while 25% are under age 18. More than half of the population is made up of working age adults.

Lodi's median household income is approximately \$30,700. Twelve percent of Lodi's families live below the poverty level, while nearly a quarter of all households have incomes of less than \$15,000 per year.

In terms of ethnicity, Lodi is primarily Caucasian. Significant minority populations include Hispanics (16.9%) and Asians (4.5%). Most Lodi residents speak English, however 12% speak Spanish and of this group 30% speak no English.

Demographics

Gender	% of Population
Female	51.0
Male	49.0

Age	% of Population
Under 14	20.3
14-17	4.8
18-24	9.7
25-44	32.4
45-64	17.0
65+	15.7

Income	% of Population
Under \$15,000	23.0
\$15-20,000	9.0
\$20-30,000	17.0
\$30-50,000	27.0
\$50,000+	24.0

Ethnicity	% of Population
White	77.5
Hispanic	16.9
Asian	4.5
American Indian	.7
Black	.3
Other	.1

Economy

Lodi is located in a highly productive agricultural area which plays an important role in the city's economy. However, Lodi's economic base also includes other elements. Principal industries in the Lodi area include agriculture, food processing, manufacturing, health services and retail.

Lodi's labor force includes 21,500 individuals. Employment by major industries includes:

Industry	% of Employment
Retail	20
Manufacturing (incl food processing)	16
Health Services	8
Educational Services	8
Wholesale Trade	5
Transportation	4
Agriculture	3

Major employers include:

Employer	Approx Workforce
Lodi Unified School District	2250
General Mills	900
Pacific Coast Producers	300-1500 (seasonal)
Memorial Hospital	650
City of Lodi	390
Valley Industries	300
Canadaigua Winery	200

Congestion Management

The entire San Joaquin Valley is a non-attainment area under the federal and state air quality acts. The San Joaquin Valley Air Pollution Control District has recently adopted a trip reduction ordinance which requires employers in the Lodi area to actively participate in encouraging alternative commute modes including ridesharing and use of public transit. The introduction of fixed route service will position the City of Lodi as a partner to the employers in meeting their trip reduction goals.

Public Transit Needs Assessment

A Transit Needs Assessment conducted in 1992 found that Lodi's Dial-a-Ride service did a good job of serving elderly and disabled residents, but was unable to meet the broader transportation needs of the growing general population. Increased service hours, reduced wait times and service to key destinations in Stockton were among the needed transit service improvements identified by the study.

As a result of the study, which included surveys of current transit riders and the general public, it was recommended that Lodi implement a fixed route transit system to operate in conjunction with the existing Dial-a-Ride service, and that intercity service to Stockton be initiated by SMART. At this time, Lodi is in the process of purchasing vehicles and finalizing plans to implement fixed route service on November 25, 1994; while SMART plans to begin service between Lodi and Stockton in October 1994.

Following are brief descriptions of the existing demand response service, the new Lodi fixed route service and the connecting SMART service.

Demand Response Service

The City of Lodi currently provides general public demand response service, called Dial-a-Ride, throughout the City of Lodi, plus the unincorporated area of Woodbridge, the Arbor Mobile Home Park in Acampo and the Freeway Mobile Home Park located south of the Lodi city limits. Dial-a-Ride operates seven days per week, 7 a.m. to 7 p.m. on weekdays and with reduced hours on Saturday and Sunday. Service is provided using five full-size wagons, three sedans and two wheelchair-accessible vans owned by the city.

Approximately 330 passengers per weekday (120/50 on Saturday and Sunday) use the Dial-a-Ride service. Nearly ninety percent of these individuals are elderly or disabled. While the service is available to the general public, most Lodi residents perceive it as service only for the elderly or disabled. Due to concern about overburdening the system, the city has not marketed the service in any way.

The current Dial-a-Ride fare is \$1.00 for the general public, \$.50 for senior citizens or disabled persons. County service costs an additional \$.50. The service operates on a scrip basis, with tickets sold at City Hall, Farmers & Merchants Banks, Loel Center, Hutchins Square and Lodi Memorial Hospital. Up to three persons are allowed to ride for

the price of one, if travelling from the same origin to the same destination.

Major travel destinations for Dial-a-Rider passengers include Hutchins Street Square, downtown Lodi, Lodi Memorial Hospital and other medical facilities along South Fairmont Avenue, grocery stores, the Vineyard shopping center on Kettleman Lane, Mervyn's Department Store, Walmart Shopping Center, K-Mart Shopping Center and the Loel Center.

While the city has a goal of having Dial-a-Ride passengers picked up within 45 minutes after they call the dispatcher, heavy demand often makes this goal unattainable. The primary complaint from users regarding the quality of Dial-a-Ride service is long wait times.

With implementation of the new fixed route service, some changes will be made in the Dial-a-Ride operation. Service will still be open to the general public and available seven days per week. Weekend service will be expanded. The new Dial-a-Ride service hours will be:

Monday through Friday	7:00 a.m. to 7:00 p.m.
Saturday	7:30 a.m. to 6:30 p.m.
Sunday	8:00 a.m. to 5:00 p.m.

New Dial-a-Ride fares will be increased to reflect the higher cost of providing the service and to encourage those who are able to use fixed route service to do so. Fares for Dial-a-Ride service will be:

Regular Fare	\$ 2.00
Senior Citizens/ Disability Fare	\$ 1.00
County Service Charge	\$.50
Children (Age 4 and under with adult)	Free
Ten Ride Pass	
Regular	\$20.00
Discount	\$10.00

Only one person will be able to ride for each fare paid.

Fixed Route Transit Service

Lodi's new fixed route service will include four local routes which will connect at the downtown terminal, adjacent to the Post Office on Walnut near School. Bus will run every 30 minutes and arrivals at the terminal will be coordinated to allow for easy timed transfers between Lodi routes. SMART intercity routes will also terminate at the downtown terminal for easy connections to Stockton and other destinations within San Joaquin County.

The four routes have been designed to provide service to most major destinations within Lodi including shopping centers, medical facilities, community centers, schools and employment sites. Local residents will be able to board a bus near their home, transfer for free at the downtown terminal, and be almost anywhere in Lodi in less than an hour.

Service will be provided using five new 12-passenger mini-buses. Bus stops will be signed and shelters placed at major boarding locations.

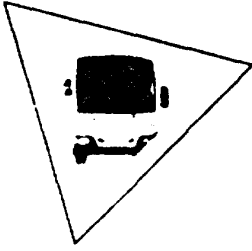
Fares for the new fixed route service will very inexpensive:

Regular Fare	\$.50
Senior Citizen/ Disabled Mid-day Special Fare	\$.25
Children (Age 4 and under with adult)	Free
Monthly Pass	\$20.00
Senior/Disabled Mid-day Special Monthly Pass	\$10.00
11-Ride Pass (Regular)	\$ 5.00
11-Ride Pass (Discount)	\$ 2.50

Transfers to connecting trips on other Lodi routes will be free within a forty-five minute period.

Intercity SMART Service

Beginning in October 1994, the San Joaquin Regional Transit District (SMART) will operate two intercity routes between Lodi and Stockton with service to Tracy, Lathrop and Manteca. Lodi residents will be able to connect from the Lodi fixed route or demand response service to the SMART routes to make trips to the county hospital, county welfare office and other destinations in these nearby communities. Once in Stockton, riders will be able to connect to local Stockton routes to reach destinations not directly served by the intercity routes. The regular fare for the intercity service will be \$1.00.



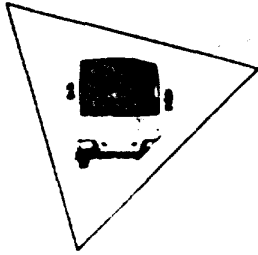
Marketing Goals and Objectives

The primary goal of this marketing plan is to introduce and maximize utilization of Lodi's new fixed route services, resulting in satisfactory ridership and farebox recovery. More specifically, this goal can be broken down as follows:

- Establish a new identity for Lodi's transit system.
- Retain and increase usage among current dial-a-ride users, by converting as many as possible to fixed route ridership.
- Attract new riders to the fixed route system.

Objectives to be pursued in attaining these goals are:

- Create a high level of visibility and awareness for Lodi's new transit system.
- Educate the public regarding the variety of public transit services now offered in the Lodi area.
- Educate current and potential riders regarding how to use the new fixed route service, by providing effective, easy-to-use passenger information materials.
- Identify key potential rider groups and use targeted marketing to show them why they should use Lodi's new and existing services.



Target Markets

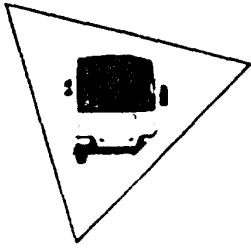
Until now, Lodi's public transit services have been used almost exclusively by the elderly and persons with disabilities. These individuals have been willing to accept the long wait times and unpredictability of the Dial-a-Ride system because they had few transportation options and/or had time to spare.

With the introduction of fixed route service, Lodi's transit system will become a viable transportation option for many new groups including workers, students and homemakers, as well as providing new transportation opportunities for many existing Dial-a-Ride users.

Following are brief descriptions of those groups which offer the greatest potential for transit usage once the new system, including local fixed route, Dial-a-Ride service and intercity SMART service, is in place.

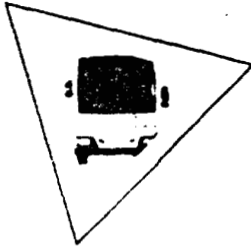
- **Low Income families.** Low income families with one or no cars in the household will be an important target market for Lodi's transit service. Approximately one quarter of the area's households have incomes of less than \$15,000 per year. The new fixed routes will give these families the freedom to access shopping, medical facilities, social service agencies and recreation easily and inexpensively. Riders attracted from this group are likely to be primarily women who traditionally offer higher transit ridership potential, due to their lower economic status. This group is diverse and can be reached through general advertising and direct marketing through social service agencies.
- **Service/Retail workers.** Service and retail workers and those in other relatively low income positions are an excellent target for the new fixed route service. This group includes primarily young workers, high school students through young adults. If they can be attracted, the daily nature of their trips offers high potential for ridership growth. These individuals can be targeted through general advertising or directed efforts through their employers.

- **Employees of major employers.** Another potential market for building commute ridership is the employees of major employers who are required by the trip reduction ordinance to reduce vehicles trips to their worksite. Lodi can work with employers to encourage transit ridership through information distribution, promotional programs and fare subsidies provided by the employer.
- **Elderly.** Many elderly persons will prefer to continue using Lodi's dial-a-ride service due to it's door-to-door nature and "security." In fact more seniors can probably be attracted to the dial-a-ride once it is less crowded with other trips and therefore more responsive. However, seniors who live near the fixed routes also offer a potential market for the new service. Seniors make up 16% of Lodi's population, offering a potential market of approximately 8000 persons.
- **Persons with disabilities.** Persons with disabilities will continue to be a significant portion of Lodi's transit ridership on both the dial-a-ride and fixed route services. Our goal will be to encourage as many as possible to shift to the fixed route, freeing dial-a-ride trips for ADA eligible individuals.
- **Middle and High School Students.** Lodi's fixed route service will serve several high schools and middle schools. Students can be encouraged to use the bus to commute to school or to after school jobs and recreational activities. If the schools are cooperative, they offer a vehicle for direct marketing efforts.
- **Delta College students.** Delta College students offer potential for combined promotional efforts between Lodi and SMART. College students are young, relatively low income, and make daily commute trips, therefore offering excellent potential for transit ridership. They also offer the advantage that they are all commuting to a single location which will be well served by the new SMART route. Therefore Delta College students offer an excellent target for direct marketing efforts.



Creative Concepts

To be finalized once name selection is complete



Marketing Strategies

Following is a comprehensive strategic plan for marketing Lodi's transit system. This plan provides strategies and tactics in each of seven marketing areas:

- System Identity
- Passenger Information
- Advertising
- Targeted Programs
- Outreach Efforts
- Public Relations
- Special Promotions

Those efforts noted with the symbol → are recommended for immediate implementation. Those efforts noted →→ are recommended for immediate implementation and will be supported by materials to be produced by the consultant.

System Identity

Our first marketing task is to establish an identity for Lodi's new transit system. We must make Lodi residents aware that public transportation is now available and easy to use; and establish strong name recognition for the new system.

Strategies which will be part of that process include the following:

- • **Logo Utilization.** As part of this project a name and logo will be developed which will come to be instantly identifiable with the transit system. This logo will be easy to recognize and should be used consistently on all materials which communicate transit information...from buses and bus stop signs down to the simplest flyer.
- • **Bus Design.** Along with the logo, a color scheme for the new buses will be developed to differentiate and identify the new system. While immediate conversion to the new color scheme may not be possible for existing dial-a-ride vehicles, a decal version of the new logo should be placed on all vehicles at the time of the November kick-off.
- • **Bus Stops.** Bus stop signs will identify fixed route stops and provide an important vehicle for permanent, on-street advertising. In addition to letting passengers know where to wait for the fixed route service, bus stop signs inform potential riders that bus service is now available in a particular area.

Bus stop signs will be designed to include the following features:

- The system logo and colors to identify them immediately with the new system.
- A clear bus stop destination for those who cannot read English or are unfamiliar with the system.
- The phone number for route and schedule information.
- Size: 12" X 18" for easy visibility (this is a standard size which can be produced economically).
- Side mounted and two-sided, so that bus stops can be easily located by pedestrians coming from either direction.

As Lodi's fixed route service develops, the system should strive to offer passenger amenities, particularly at heavily used bus stops. Amenities most desired by passengers include:

- Benches.
 - Shelters.
 - Route and schedule information displays.
 - Trash receptacles.
 - Pay telephones.
- • **Printed Materials.** The new system identity - logo and colors - should be carried through to all printed materials including:
- System stationery and forms
 - Passenger information materials
 - System news releases
 - Advertising and promotional materials
- **Driver Uniforms.** Transit drivers are the front line representatives of any transit system. Therefore, it is important that the new system identity be carried through to the driver uniforms. Uniforms should be professional and attractive; should be coordinated with the system colors; and should display the system name/logo (as a patch on the sleeve or over the pocket).

Passenger Information

Effective passenger information materials are the single most important marketing element in encouraging new riders to use transit. Non-riders and dial-a-ride users must be educated in how-to-ride the new fixed route services and helped to overcome their initial fears.

To be effective, passenger information materials must be:

- Attractive. They must create a positive image for the system.
- Easy to use. If reading the map is hard, they'll never ride the bus.
- Accurate and up to date. If the information is wrong the first time, you'll never get them to try again.
- Easily available. Great maps and schedules are of no value if they aren't in the potential rider's hands.

The following Passenger Information strategies are recommended for Lodi's new transit system.

→ • Telephone Information.

The availability of courteous and convenient route and schedule information by phone is a major factor in converting potential transit riders to new riders. The Dial-a-Ride dispatch center should be organized to also serve as the transit telephone information center. This telephone number should be included in all transit communications.

Care should be taken to insure that adequate, well trained staff is available to answer the phone during service hours. This staff should be familiar with every aspect of the transit system (fixed route, Dial-a-Ride, and SMART routes) and should be able to provide the following information/services:

- Fixed route trip planning. They should be able to provide immediate trip plans for persons traveling within Lodi or connecting to the SMART routes for trips to Stockton. Information provided should include where to catch the bus, what time to catch the bus, the fare, where and how to make transfers and what time the passenger will arrive at their destination.

If a person is unable to walk to the fixed route or wants to make a trip on Sunday, Dial-a-ride should be offered as an alternative.

- **Bus stop information.** The telephone information center should have a complete list of bus stops with information regarding exact location (which corner of intersection) and amenities (curb cuts, shelters, benches). This information is particularly important for serving persons with disabilities.

- **Information materials distribution.** The information center should have available Rider's Guides for mailing to callers who request them. In addition, they are a logical group to take charge of the passenger information distribution function discussed below.

- **Dial-a-Ride dispatching.** Of course the information center will continue to plan and dispatch dial-a-ride services.

→ • **Phone directory listing.**
To maximize the ease of accessing transit route and schedule information, the telephone information number should be listed in the phone directory in the following ways.

- List under system name in the white pages.
- List under Transportation in the blue government pages.
- List under Bus Lines or Bus Services in the yellow pages.

If possible, place a small ad with the yellow pages listing which includes the following:

System Name

- Public transit service throughout Lodi
 - Bus Service
 - Dial-a-Ride Service
 - Connections to Stockton
- Hours of Telephone Center
- For personal trip planning or a free Rider's Guide.....333-6806

→→ • **Riders Guide.**

Produce and actively distribute a comprehensive Rider's Guide which will provide the new or current rider with everything they need to ride the bus. The Rider's Guide, which will be produced as part of this project, will include:

- A large, color coded system map showing exactly where each transit route goes and highlighting all key destinations. This map will show how the routes interconnect so that a rider can travel to any destination served.
- How to ride information, including where to board, fares, pass information, how to call for trip planning assistance, etc.
- Information about other transit services including Dial-a-Ride and SMART intercity routes.
- Easy to read schedules for Lodi fixed routes. Instructions on how to read the schedules will be included.
- If possible, a Spanish information section with basic information about the system, and an explanation of how to use the map and schedules.
- An easy to recognize cover which utilizes the updated logo/bus visual.

→→ • **System map poster.**

The Rider's Guide will be designed such that (unfolded) it can be used as an information poster. The poster side will include the Lodi transit system map, logo, theme, phone number and fares. The poster will provide a means of visibly displaying transit information at bus stops, in store windows, at senior centers and schools and at other appropriate locations. Businesses and agencies along the routes should be asked to display the poster in their window or other visible location. When possible it should be accompanied by a take-one holder with Rider's Guides.



● **Distribution network.**

Widespread distribution of transit passenger information materials can substantially increase exposure and aid in the process of educating new riders. A network of distribution locations should be established, provided with information displays and stocked on a regular basis.

Recommended locations for inclusion in the distribution network for the Rider's Guide and display of the information poster are:

- Hutchins Square
- Loel Center
- City Hall
- County Service Center
- Public Library
- Public Recreation Centers
- High-traffic Retailers (K-mart, Mervyns, Target, Wal-Mart, etc.)
- Banks
- Employers
- Senior Centers, Homes and Nutrition Centers
- High Schools and Middle Schools
- Low to Middle Income Apartment Complexes
- Lodi Memorial Hospital
- Clinics and Medical Offices
- Social Service Agencies
- Chamber of Commerce

Potential riders should also be able to pick up a Rider's Guide on any bus or call transit information to receive one by mail.

Information distribution can be greatly enhanced by the purchase of take-one displays with the transit system logo and phone number silk screened on them. This represents a relatively small expenditure, and these attractive racks will encourage businesses to display transit information and greatly increase its visibility. A variety of standard information holders are available from firms such as Beemac Plastics. To make the map poster more attractive and durable, a quantity of them can be laminated prior to distribution.

Restocking of information distribution locations can be handled in a variety of ways.

- A part-time employee or off-duty bus driver can be utilized to physically visit and restock each location. A physical visit should be conducted at the initiation of the program, and at least once every six months. At this time, at least one contact person at the distribution point (i.e. the receptionist at a doctor's office) should be briefed regarding what the system offers, how to call for more Rider's Guides, and how to direct customers to call for trip planning assistance.

- Interim restockings can be handled by mail. A contact person can be established at each distribution point, and packets of literature periodically mailed to that contact for restocking.

- It may be possible to recruit a marketing intern from Delta College to help with this and other outreach efforts.

Anytime updated information is printed, all out-of-date information should be replaced immediately. Information must be consistently up-to-date if it is to be trusted by potential riders.

→→ • **Dial-a-Ride distribution.**

The new Rider's Guide should be distributed to all Dial-a-Ride passengers prior to initiation of the new service. You may also wish to give them a free round trip ticket to encourage everyone to try the fixed route service right away.

- **Passenger Information at bus stops.**

The more information that can be provided to passengers waiting at the stop, the better. This is particularly important at major transfer points such as the Downtown Terminal. This stop should be equipped with an information display (possibly a locking plexiglass case) where route maps and schedule information can be displayed. The Rider's Guide will be designed such that it can be easily mounted to provide full information.

→ • **Accessible Passenger Information.**

The Americans with Disabilities Act requires that passenger information be available in forms that are usable by persons with disabilities. Your most accessible information tool will be the telephone information center. It can be easily used by persons

with mobility and vision impairments, and through the TDD by persons with hearing impairments.

A simple format to create for persons with vision impairments is an audio cassette that provides an overview of the system, a route by route description of destinations served and basic schedule information. If desired, the text portion of the Rider's Guide can be translated into braille, with the help of the Community Blind Center in Stockton.

- **Non-English Information.** The population of Lodi includes a significant number of Hispanic residents, one third of whom do not speak English. It is therefore recommended that some passenger information be provided in Spanish and that, whenever possible, the telephone information center be staffed by bilingual employees.

Advertising

In order to maximize coverage of all target markets and minimize cost to the City of Lodi, we recommend an advertising program that combines paid media advertising and non-paid advertising channels.

Media advertising should be used to introduce and build awareness for the new Lodi transit system, and to encourage potential riders to find out more about the system. Ads should motivate potential riders to call the transit telephone information number or pick up a Rider's Guide. The primary paid media available, newspaper and cable TV, reach broad audiences. Therefore ads should be relatively general in nature, focusing on appeals that are common to our target markets...citywide service that is quick, convenient and inexpensive.

Non-paid advertising vehicles can be used to reach more specific targets and to reach those groups less likely to subscribe to the newspaper or cable TV (i.e. lower income families). Many non-paid vehicles exist within the Lodi community which can provide excellent coverage at little or no cost. Messages for these media can be general or more targeted, depending on the audience reached.

Paid Advertising Vehicles

- ● **Newspaper Advertising.** The primary local advertising vehicle within Lodi is the daily newspaper, the *Lodi News-Sentinel*. The newspaper has a circulation of over 11,000 within the City of Lodi.
- **Cable TV Advertising.** Approximately half of all Lodi households subscribe to cable television which is provided by King Videocable Company. If budget allows, this provides an additional advertising vehicle. At this time, no demographic information is available about cable subscribers.
- ● **Yellow Pages Advertising.** As discussed under System Identity, the transit telephone information number needs to be easily accessible in both the white and yellow pages of the phone directory. A small in-line ad in the yellow pages can let potential new riders know what services are available and how to get trip planning assistance.

Non-Paid Advertising Vehicles

- ● **Utility Bill Stuffer.** An excellent vehicle for reaching every home in the Lodi community is an insert in the utility bill mailing. An 8 1/2" X 11" flyer can provide each household with

basic information about the new fixed route service. In addition, notices imprinted directly on the bill can provide regular reminders that the service is there and how to get trip planning information.

- **Hutchins Square Newsletter.** Hutchins square publishes a newsletter for seniors who participate in the center's activities. In addition, the manager of Hutchins Square's senior program writes a question and answer column for the Lodi edition of the Stockton Record. Both of these are excellent vehicles for conveying information about the new transit system and how it can serve the needs of seniors.

- **PTA Newsletter.** Another targeted newsletter is that published by the community wide PTA organization. Heidi Kiser, president of the PTA, should be contacted regarding the inclusion of information about the new transit system and how it can serve the needs of students for after school and weekend transportation.

- **Pulse.** Lodi Memorial Hospital publishes a weekly internal newsletter called the Pulse which goes to all staff and physicians. This is a good vehicle for communicating how the transit system can meet the commuting needs of hospital staff and the medical travel needs of patients. The hospital also holds weekly "Host" meetings for doctors and the staff persons, at which a personal presentation regarding the new transit system can be made.

- **LodiBusiness.** The Chamber of Commerce newspaper is a good vehicle for communicating with community leaders and employers regarding the need for them to support the new transit system. Communications should highlight the benefits the community will enjoy from the new fixed route system...a more mobile workforce; a commute alternative for employers who must meet trip reduction requirements; improved transportation for the elderly, disabled and students; and provision of an important social service.

- **Downtown Business Association Newsletter.** This is another vehicle for reaching both employers and retailers who we hope will become involved in promoting the new transit service. This group should be particularly supportive since the fixed route system will provide excellent service to downtown businesses.

● **Other Employer/Organization Newsletters.** Other employers and organizations probably publish internal newsletters. These groups should be provided with both articles and ready-to-insert ads regarding the new transit system.

Targeted Marketing Programs

Within the target markets identified for transit are several groups of potential riders which can be cost-effectively targeted through direct marketing programs. Following are several potential targeted programs which are both low cost and highly effective.

→→ • **Retail/Holiday Promotion.** The new fixed route service will be introduced just in time for holiday shopping so an introductory retail promotion is a natural. The promotion can take any number of forms from simply providing retailers with a bag stuffer announcing the new service up to the full blown "Major Retail Promotion" outlined under special promotions. Based on the amount of time and staffing likely to be available for implementation and the fact that retailers are already very busy in November, the following promotion is recommended:

- **Retail bag stuffer.** Provide targeted retailers with bag stuffers to be given to every shopper during the period of November 25-30. The stuffer should announce the new system, provide a simple system map, encourage potential riders to call for a personal trip plan, and offer a free trial ride during the holiday shopping period.

- **Support posters/counter toppers.** The flyer can double as a poster or counter topper by being placed in a plastic signholder, significantly increasing visibility of the new system.

- **Support advertising.** Newspaper advertising should reemphasize the message, and encourage shoppers to try the new fixed route system.

- **Target Retailers.** Target retailers should include major retailers well served by the new fixed routes (K-Mart, Mervyns, Target and Walmart) plus downtown merchants within walking distance of the transit terminal.

→→ • **Senior Program.** Encouraging senior citizens to try the fixed route service or switch from Dial-a-Ride will take a targeted, "hands on" approach. Personal contact and targeted communications must be used to overcome their fear of something new and unknown.

Elements to be included in this program should be:

- **Senior Flyer.** This flyer should be designed specifically with the senior citizen in mind. It should describe the advantages of using the new fixed route system; highlight the \$.25 senior fare and what ID is required; and perhaps include a list of destinations frequented by seniors with the routes serving them. The brochure should be distributed through senior centers, social service agencies serving the elderly and other locations frequented by seniors.

- **Presentations/Trip Planning Sessions at Senior Centers.** As staff availability permits, transit staff should then schedule presentations at area Senior Centers and nutrition programs. These presentations can be very simple - just a friendly statement of what the transit system can offer seniors. The presentation should be followed by a personal trip planning session where attendees can have their bus trip planned for them and receive a highlighted Rider's Guide. Some transit systems provide a bus to take the participants on a trial run and one system turns the whole event into an ice cream social to encourage participation.

→→ • **Student Program.** Students old enough to go places alone, but too young to drive, are an excellent target market for transit ridership. Middle and high school students can be encouraged to use the bus to access after school jobs or recreation activities during the school year; and to get around for work or fun during the summer. Many transit systems have implemented a discounted student fare or discounted summer youth pass programs to encourage recreational ridership by teens during summer vacation. These summer passes are generally heavily discounted, are good for the entire vacation period and are sold only to youths 18 and under. Other systems simply work through the schools to provide students with transit information.

We recommend that a targeted flyer announcing the new service be distributed through the schools or PTA to all middle and high school students. In addition, permanent transit information displays should be established at these schools.

→→ • Employer Program.

Building commute ridership is important for any transit system, as these are the individuals that become daily riders and make up a large portion of overall ridership. Employers can be an excellent, targeted means of communicating with commuters, particularly Lodi's larger employers who are required by the San Joaquin Valley's trip reduction ordinance to encourage alternate modes of commuting. The City of Lodi should position itself as the employer's partner in meeting trip reduction goals.

Employers located on the fixed route system should be provided with the tools to encourage transit ridership in the following ways:

- Distribute targeted information to employees through interoffice mail. Periodic flyers can announce the new service, provide incentives for trial ridership (i.e. free rides), and provide reminders that their worksite is served by public transit.
- Establish a transit information display at the worksite. This display should include a mounted system map with the worksite highlighted, plus a take-one rack of Rider's Guides and other appropriate information materials.
- Sell monthly transit passes at the worksite. This makes it extremely convenient for employees to purchase their transit pass.
- Subsidize transit passes. Many employers will further promote transit by subsidizing employees who purchase monthly passes. For example the employer might pay the City of Lodi full price for the pass but charge the employee only half price...or give it to them free. Employers can deduct up to \$60 of subsidy per month per employee as a standard business expense.

Some employers might even be willing to take more aggressive steps in promoting transit usage such as:

- Provide shuttle service from the worksite to the bus stop. Employers not located directly on a bus route or major road may be willing to shuttle employees to and from the bus stop, making transit a viable alternative for

their workers.

- Participate in subscription services. For employers or employment centers with a large number of workers, special subscription services might be viable. Subscription services generally provide direct limited stop service tailored to the needs of a specific group. "Subscribers" are required to purchase monthly passes; and employers are often asked to share operational costs not covered by fares.

→→ • **Dial-a-Ride Conversion Program.**

One of the goals of the new fixed route service is to reduce the load on the Dial-a-Ride system. During the month prior to start-up of the new fixed route system, every Dial-a-Ride passenger should receive a flyer announcing the new service and the advantages it offers them...no waiting, convenient service, lower fares, new wheelchair accessible vehicles. The flyer should also include a free ride pass to allow them to try the fixed route service during the first week.

In addition, if Dial-a-Ride fares are raised, as recommended by the planning consultant, a special effort will need to be made to announce the fare increase. This should be separate from the flyer announcing the new service, but should offer fixed route service as a lower fare option.

→ • **Social Service Agency Program.**

Working with social service agencies is largely a personal selling job. However, if you keep them well informed and provided with sufficient passenger information materials, they can be an important marketing vehicle for the transit system. Social service agencies, in Lodi and Stockton, which should be contacted, given an overview of the new service, and provided with passenger information materials should include:

- Social security office
- Welfare office
- Unemployment office
- Medical Clinics
- Community Blind Center
- United Cerebral Palsy
- Valley Mountain Regional Center for the Developmentally Disabled

- Goodwill (sheltered workshop in Stockton)
- Other agencies that serve the needs of the elderly, low income families, persons with disabilities and Spanish speaking residents

• **Delta College Program.**

While Delta College is not within the Lodi service area, it will be accessible via a connection with the SMART intercity route. A joint promotion with SMART should encourage Lodi residents who attend classes at the college to commute via transit.

- **Direct Mail through the College.** Ask the college to include a SMART/Lodi flyer in the registration packets or other mailing they send to students who live in Lodi zip codes, prior to the beginning of the semester. This will make students aware of the transit alternative from the beginning. The brochure should include:

- the benefits of transit for commuting to campus,
- a map showing the Lodi and SMART routes that serve the campus,
- an offer of personal trip planning or a Rider's Guide.

- **Participation in Registration.** If there is an open registration period on campus, ask the college if Lodi/SMART can have a booth in a high traffic area. This is an excellent opportunity to promote transit and provide trip planning services to students.

- **Information Display on Campus.** Establish a permanent transit information display on campus. It should include mounted information plus a take-one rack for Rider's Guides and other brochures.

Community Outreach

A variety of opportunities exist for the City of Lodi to communicate with potential riders through community outreach activities such as personal presentations and rideshare fairs. While these efforts are quite labor intensive, some can be implemented using off-duty bus operators, a marketing intern or volunteers.

→ • **Community Presentations.** An effective ridership building tool is presentations to community groups and organizations that include or represent potential riders. These presentations can be very simple...telling people what services Lodi's transit system offers, how they or their clients can access the services, handing out Rider's Guides and giving audience members the opportunity to ask questions. Appropriate targets for community presentations are:

- Hutchins Square (senior swim program)
- Loel Center (Nutrition Program)
- AARP Meetings (Hutchins Square)
- 50+ Club (Hutchins Square)
- Senior Citizens of Lodi
- Eastside Improvement Meetings (Loel Center)
- County Service Center Community Meetings
- Salvation Army
- PTA Groups
- Lodi Adult School
- Disability Groups
- Chamber Committee Meetings (Employers)
- Weekly Host Meetings at Memorial Hospital

• **Speakers Bureau.** To communicate the benefits that transit offers the community, the transit system's manager should solicit opportunities to speak to civic and business organizations such as Rotary Clubs, Kiwanas, Lions Clubs, Chamber of Commerce, etc. While these groups are comprised primarily of non-riders, they are nevertheless an important target. They include community and business leaders who can be helpful in implementing employer, retail or other targeted programs and can be important contacts as the transit system grows. These presentation should focus on the benefits public transit offers the Lodi community...a more mobile workforce; a commute alternative for employers who must meet trip reduction

requirements; improved transportation for the elderly, disabled and students; and provision of an important social service.

- **Rideshare Fairs/Community Events.** Seek out opportunities to participate in Rideshare Fairs and community events where transit can staff a table, hand out literature, and provide trip planning information. These are excellent opportunities to sell your services one-to-one. To enhance these efforts you may wish to develop a display. This can include a table skirt with the transit system logo and/or a backdrop display on which posters and materials can be mounted.

Public Relations

News articles, feature stories and public affair programs can be effective tools for gaining added exposure without advertising costs. These tools require more time and effort to utilize, but can be very rewarding as they offer a high level of exposure and credibility.

- ● **News Releases.** News releases can be generated any time something newsworthy happens with the transit system. They should be mailed to the News Editor or News Director at both the Lodi and Stockton newspapers. Worthy topics for news releases include:
 - Name change.
 - Initiation of fixed route service.
 - Route or schedule changes.
 - Introduction of the new Rider's Guide.
 - Significant ridership increase.
 - Special Event Services
 - Special promotion or event (i.e. free ride day).

- ● **Public Affairs Programs.** Lodi's transit manager should solicit opportunities to appear on public affairs programs on local cable television stations to discuss the new fixed route system. Once such program is hosted by Geraldine Schook of the Loel Center and targets senior citizens. This is another opportunity for free, highly credible coverage.

- **Feature Articles.** Feature articles, unlike news releases, do not necessarily deal with newsworthy events. They often take a human interest approach. For example, an article about a particular Lodi transit rider and how he/she uses the bus; or an article about a driver who has been driving buses for X years. Feature articles can often be solicited by contacting a reporter or assignments editor with an idea.

Special Promotions

Special promotion include a wide variety of miscellaneous activities undertaken to encourage ridership. This would include joint promotions with merchants, special events, free ride days, etc. Promotions can target the general public or very specific target groups (i.e. senior citizens, high school students, college students, etc.). Development and execution of promotions is often quite labor intensive, but they can provide good generators for trial ridership and they can stretch a limited advertising budget.

Following are descriptions of a variety of potential promotions for use during the new system's first year and beyond.

- **Major Retail Promotion.**

To generate trial ridership of the fixed route system, a major joint promotion with a merchant well served by fixed route service could provide excellent exposure. The choice partners for the promotion would include Wal-Mart, Target, K-Mart or Mervyns. These merchants share a similar target market with the transit system, are likely to be a key destination for bus riders, and are well served by the new service.

Each partner would contribute to the promotion and would benefit from the traffic and interest created. Elements of the promotion might include:

- You would provide the merchant with promotional flyers including a free round-trip ride coupon (good throughout the month). The flyers would be given to every customer (or used as a bag stuffer) for a one week period.
- You would provide the merchant with promotional posters for use within the store.
- You would run limited newspaper advertising announcing the promotion.
- You might announce the promotion in a utility bill stuffer.

- The merchant would be asked to mention the promotion in all advertising during the week.
- The merchant would offer a discount to anyone returning with a used free ride pass. (The free ride coupon could be a punch pass which the driver validates with his/her transfer punch).
- To get the bus operators excited about the promotion, you might give them buttons that tie in to the promotional theme.

This promotion would offer potential riders a chance to try the new fixed route service for free; then reward them with a store discount for doing so. It would also allow you to increase transit's visibility by teaming up with a major advertiser.

• **Merchant Discounts.**

A similar promotion on a smaller scale. Ask a key merchant or merchants served by the system (i.e. Wal-Mart or Mervyns) to offer a discount to anyone showing they rode the bus to the store (the driver would have to give them some kind of coupon or voucher). This program could be promoted via:

- In store posters or counter cards.
- Flyers provided by the merchant to hand out on the bus.
- A tag to newspaper ads of the transit system and the merchant.

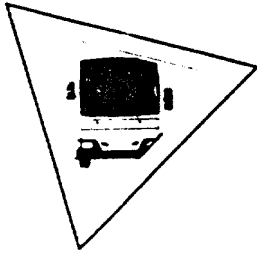
This same concept can be used for a special event. For example negotiate a discount on admission to the Fair or other events for those who ride the bus there.

• **Free Ride Day.** Have the mayor of Lodi declare one day Free Ride Day (or 10 cent ride day)...perhaps the Friday of National Transportation Week or California Rideshare Week to take advantage of the existing publicity. Use news releases, utility bill notices, school announcements and posters in area merchants to promote the day. Encourage riders to bring friends. To avoid the revenue loss engendered by a free ride day, you may wish to ask an area merchant or organization to sponsor the day. For a minimal cost (to cover lost fares) a merchant could offer area residents free rides on them. In this case, the sponsor would also participate in promoting the event.

● **Summer Free Ride Day for Students.** To encourage summer ridership among students, you could host a summer free ride day for students. The day should occur shortly after school recesses for the summer break and should be promoted via news releases and announcements or flyers at the schools during the last week of classes. Revenue losses would be minimal, since only a small portion of transit riders are likely to be students.

This same strategy can work for any other target group as well, for example Delta College students or senior citizens. The primary communications vehicle could be flyer/posters distributed through targeted organizations such as the schools, college or senior centers.

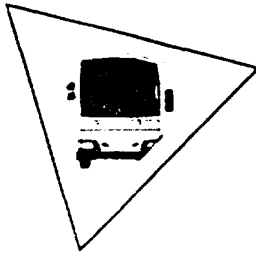
● **Transit Ambassadors Program.** A Transit Ambassador program is a means of getting your most loyal riders involved in introducing new riders to the system. Regular riders who are friendly, articulate and knowledgeable about the system could be invited to become Transit Ambassadors. They could be provided with name badges identifying them as a "Transit Ambassador," and a special free, unlimited use pass. In return they would be asked to seek out people who had never tried transit and introduce them to the system; to assist new passengers when they encounter them on the bus; and to participate in promotional events (such as staffing an information table at a community event). This is one way of gaining some staff support for the marketing program.



Recommended Budget and Implementation Schedule

Strategy/Activity	Sep94	Oct94	Nov94	Dec94	Jan95	Feb95	Mar95	Apr95	May95	Jun95	Budget
Finalize Marketing Plan	X										Consultant
System Identity											
Finalize name/logo/color selection	X										Consultant
Design bus stop signs and vehicle decals	X										Consultant
Produce bus stop signs and vehicle decals		X									Operations
Install bus stops			X								Operations
Passenger Information											
Establish transit information center			X								Operations
Produce Rider's Guide and poster		X									Consultant
Print Rider's Guide and poster		X									\$ 5,000
Order racks for Rider's Guides		X									\$ 500
Establish distribution network			X								Operations
Passenger Notices (as needed)											\$ 500
Advertising											
Design, write and produce ads	X	X									Consultant
Lodi News-Sentinel Advertising (16X)			X	X	X	X	X	X	X	X	\$ 4,000
Yellow Pages Advertising											Operations
Utility Bill Stuffer/Notices			X		X		X		X		\$ 2,000
Non-paid publications (distribute ads/articles)				X							\$ 250

[illegible]



Marketing Materials to be Produced by Consultant*

- Logo
- Bus Stop and Vehicle Designs
- Rider's Guide/System Map Poster
- Series of Promotional Flyers
 - Utility Bill Stuffer/General
 - Retail/Holiday
 - Employer
 - Senior Citizens
 - Student
 - Dial-a-Ride
- Series of Print Ads
 - General
 - Retail/Holiday
- Formats for passenger notices and new releases

• Promotional materials will produced in a format ready to be printed, silkscreened, etc. Printing is not included in the consultant's contract budget.